

2014

LED Online
Application
Instruction
Manual





Dear Economic Development Colleagues,

The West Virginia Development Office is pleased to be your partner in economic development initiatives throughout the State of West Virginia. Through this partnership, the Development Office administers the Local Economic Development (LED) and Certified Development Community (CDC) programs, and provides funding for county economic development authorities.

With your input, and in cooperation with the West Virginia Economic Development Council (WVEDC), we have updated many aspects of the LED and CDC programs. We are continuing the development of an online application and client data management system that will improve efficiency in the LED program, and more importantly, provide a tool for more efficient management of economic development data.

This LED online application and client management system is part of an initiative to integrate business processes within the Development Office through the development of a State and Federal Economic Development System (SAFEDS).

The SAFEDS system features a Local Economic Development Authority site that will provide a platform for data sharing and assist in the partnership between State and Local economic development professionals. The SAFEDS Local Economic Development Authority Website provides the ability to:

- View company and contact information maintained by WVDO.
- Fulfill retention and expansion visitation reporting requirements.
- Submit the LED Application online.

The deadline for submission of your LED Grant application is at the end of April each year. In order to conduct "Business at the Speed of Life," this tool will be available to you immediately and will serve as the new mode of communication. I wish you great success in the coming year and appreciate your cooperation in the administration of the LED program. Please do not hesitate to contact me directly if I can assist you in any way.

Sincerely,

J. Keith Burdette Executive Director

West Virginia Development Office



# FREQUENTLY ASKED QUESTIONS (FAQs)

#### Q: How do I access the SAFEDS – Local EDA Site?

The website address is: <a href="http://SAFEDSLocalEDA.wv.gov">http://SAFEDSLocalEDA.wv.gov</a>

The first time you access the site, you must register. Click on the word "Register" at the bottom of the page. Fill in all the appropriate boxes on the registration page, then click "Submit." You will be able to log in after you receive an email approving your new account.

#### Q: What do I do if I forget my password to the SAFEDS - Local EDA site?

To reset your password click on the "Forgot Password" link located at the bottom of the page, when prompted, enter your username (e-mail) and click submit. You will be prompted to provide an answer for the security question you provided upon registering. Once you have successfully answered your security question, you will receive an email with a new password.

#### Q: How do I change my password to the SAFEDS – Local EDA site?

After you have successfully logged into the SAFEDS – Local EDA site, navigate to the top right hand corner of the web page and click the option "Change Password." When prompted, enter your current password and your new password in the required fields. Passwords must be at least seven (7) characters long with at least one (1) number and one (1) symbol.

#### Q: Who do I call if I have questions or issues regarding SAFEDS – Local EDA Site?

OT Service Desk servicedesk@wv.gov 304-558-9966

Tom J. Saunders Tom.J.Saunders@wv.gov 304-957-2062

Kevin Meadows Kevin.M.Meadows@wv.gov 304-957-2055

#### Q: What is the graphic image at the bottom of the login page?

At the bottom of the login page, you will see a CAPTCHA (Completely Automated Public Turing test to tell Computers and Humans Apart). This is a graphic image with a series of distorted letters on an equally distorted or multicolored background. The purpose of a CAPTCHA is to protect the site from spammers and hackers attempting to create automated free accounts. Additionally, by having a CAPTCHA on your login screen, automated hackers will not be able to log in using your username and password.

#### Q: What browser may I use with SAFEDS - Local EDA Site?

The SAFEDS – Local Economic Development Authority site is compatible with all versions of Internet Explorer, Firefox and Safari.

#### Q: Will I be able to view SAFEDS - Local EDA Site with my iPad, iPhone or Android device?

Your mobile device may be used in a limited capacity to view the information on this site. (Currently, you may not upload files with your mobile device.)

# Q: What features and enhancements are planned for the future of the SAFEDS – Local EDA Site?

The ability for the Local EDA to enter and track their companies and contacts online was incorporated on June 1, 2013. Further enhancements within the SAFEDS – Local EDA site will allow for improved efficiency and communication between the Local EDA and the West Virginia Development Office (WVDO).

# Q: How do I submit suggested improvement for the SAFEDS – Local Economic Development Authority site?

You may e-mail any suggestions for the SAFEDS – Local EDA site to Tom Saunders.

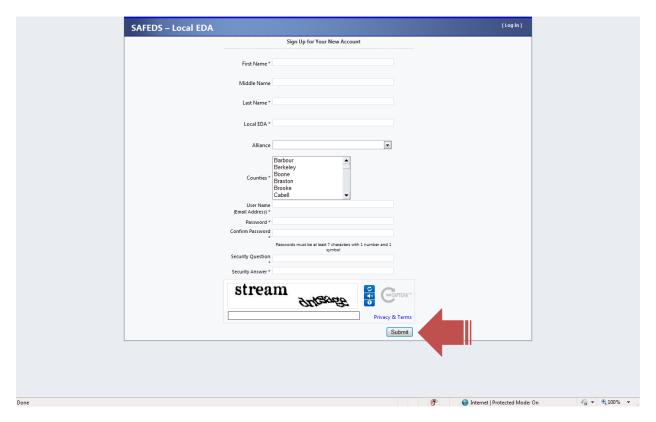
Tom J. Saunders Tom.J.Saunders@wv.gov 304-957-2062

#### Login Page



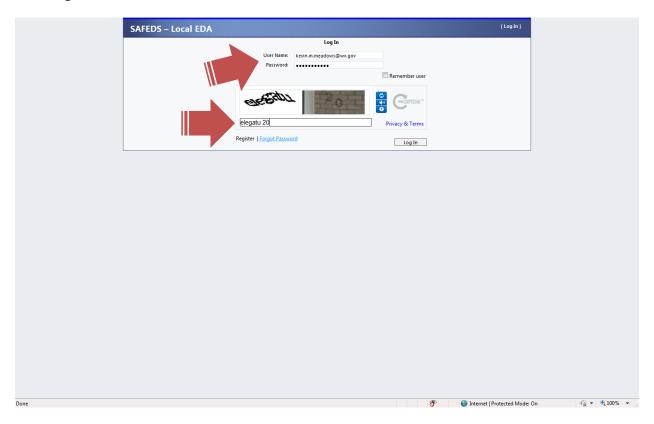
- 1. Above is the page you will see after entering the following URL: <a href="http://safedslocaleda.wv.gov">http://safedslocaleda.wv.gov</a>.
- 2. Before using the site, you must register. **Click** on the word **Register**.

#### **Registration Screen**



- 1. Fill in all the requested information on the registration page and click Submit.
  - \*You can create your own security question and answer.
- 2. After submission and approval of your information, you will receive an account approval e-mail.
- 3. You are now an authorized user of the system and may log into SAFEDS Local EDA site.

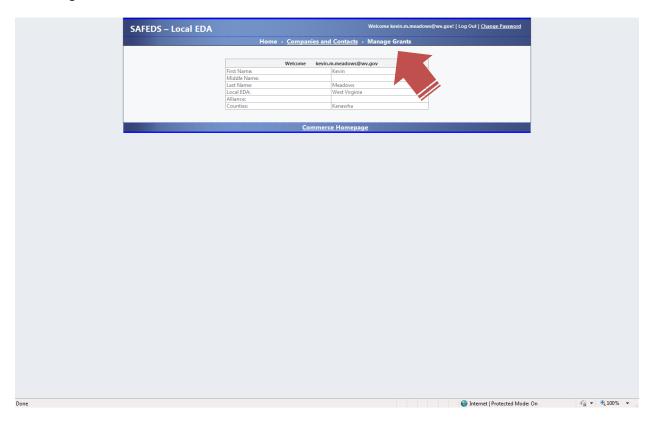
#### **Enter Login Information**



- 1. Enter your user name, usually your e-mail address, your password, and the CAPTCHA (Completely Automated Turing test to tell Computers and Humans Apart) exactly as seen. Make sure there is a space between the two words or word/number.
- 2. If you are unable to read the CAPTCHA, you may click on the blue refresh button on the right-hand side of the screen above the Privacy and Terms link.

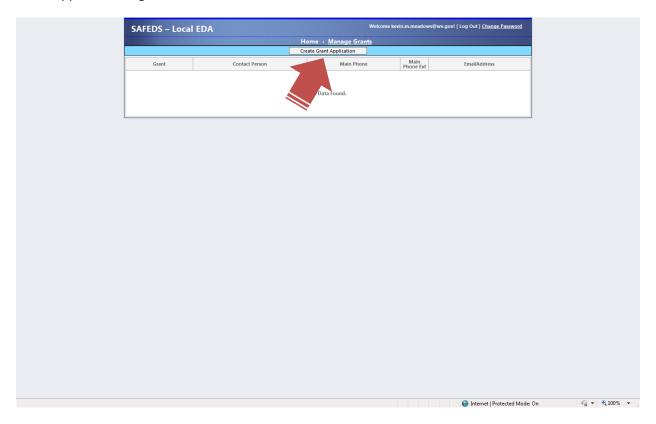
3.	Click <b>Log In</b> after you have entered the information.

#### Home Page

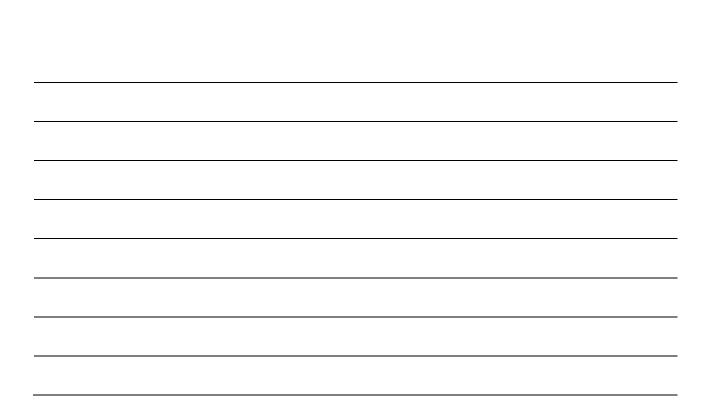


- 1. Once you have successfully logged in, you will be presented with the screen above. This is considered your home screen.
- 2. To begin a new application, click the **Manage Grants** link at the top of the page.

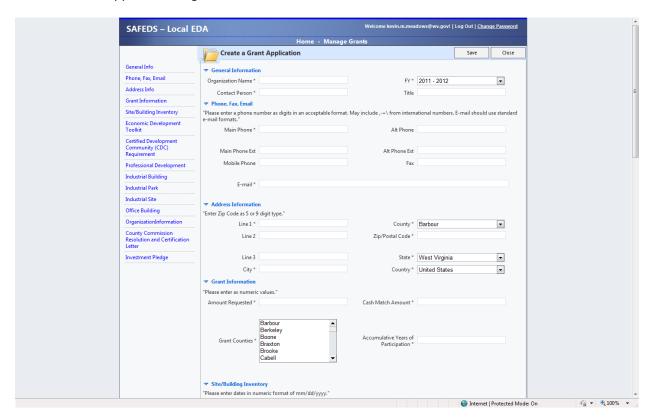
## **Initial Application Page**



- 1. After clicking the **Manage Grants** link on the previous page, you will see this page.
- 2. Click the **Create Grant Application** button to begin a new online application.

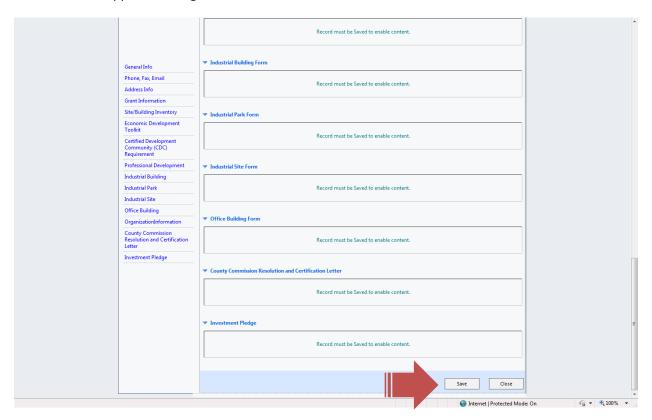


#### Create a Grant Application Page



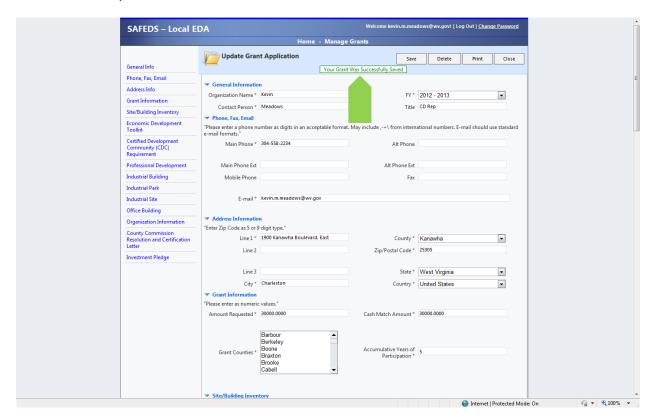
- 1. Enter as much information as possible to create a complete application
- 2. All required information regarding your organization is noted by an asterisk \*.
- 3. Please note in the *Grant Information* section that the dollar amounts should be entered without a comma or you will receive an error message.

#### Create a Grant Application Page Continued – Save



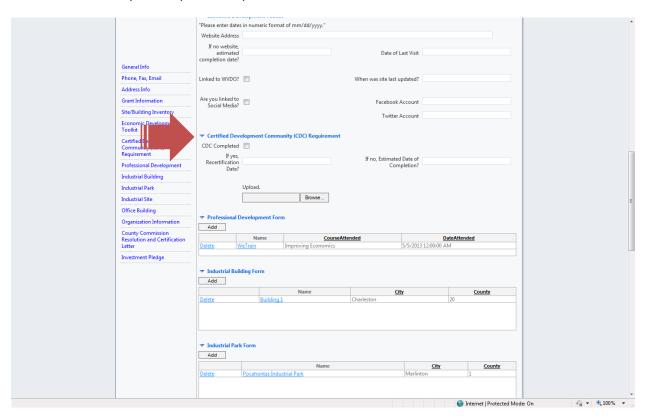
- 1. The application can now be saved.
- 2. Click Save.
- 3. After saving the application, boxes containing the phrase "Record must be Saved to enable content." will be able to accept data and uploaded files.

#### **Grant Successfully Saved**



- 1. If all information was entered correctly, you will see a message in green at the top of the application page.
- 2. If a data entry error occurs, your application will not be saved and you will not receive a message.
- 3. Scrolling through the page, you will see a message in red or a red asterisk where the error occurred.
- 4. Correct any errors as noted.
- 5. Scroll to the bottom of the page and click the **Save** button again.

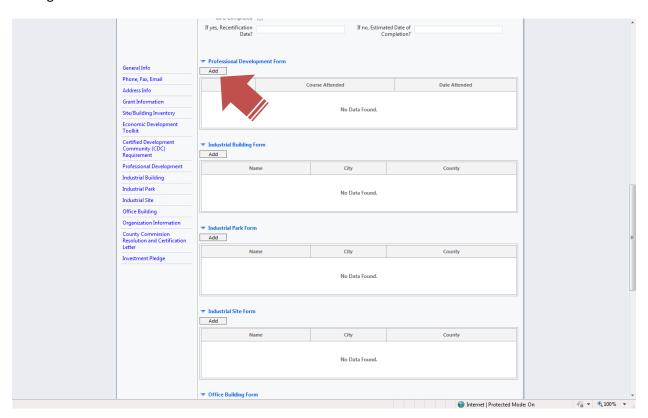
#### Certified Community Development Requirement



- 1. Information regarding your CDC eligibility will be recorded in this section. Completion, recertification date or estimated recertification date will be requested.
- 2. A document showing your certification may also be uploaded.
- 3. The process on how to upload documents is covered later in this manual.

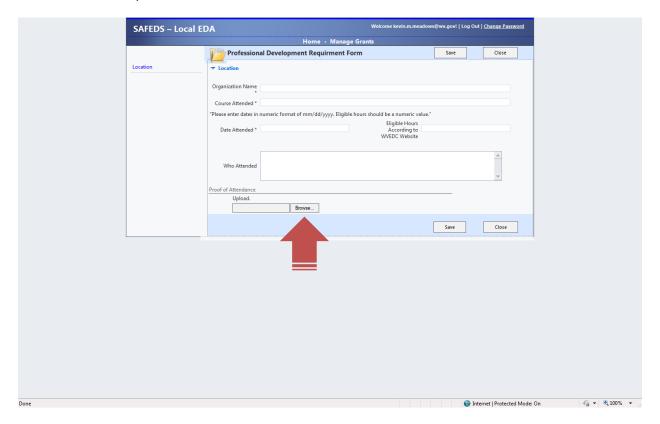
_		

#### Adding Information to Fields



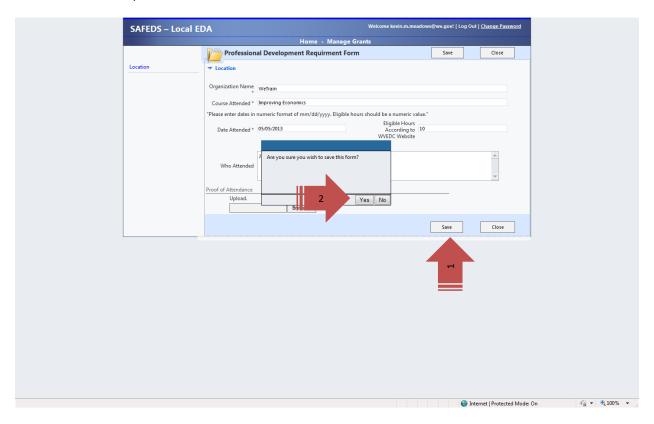
- 1. After successfully saving the application, more data entry is required.
- 2. Go to the Professional Development portion of the page.
- 3. Click the **Add** button.

#### **Professional Development Form**



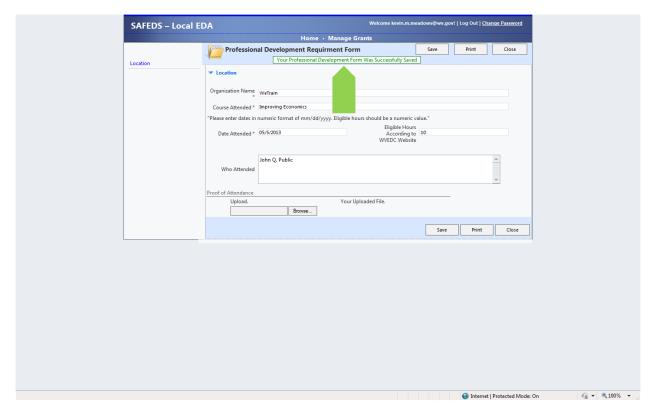
- 1. This section allows you, the applicant, to state and upload information showing proof of the 30 hours of training required to maintain your certified status.
- 2. A Proof of Attendance file may be uploaded. The maximum is 20 MB per document.
- 3. To upload a file, click the **Browse** button and find the requested file. File uploads are covered later in this manual in greater detail.


#### Professional Development Form - Save



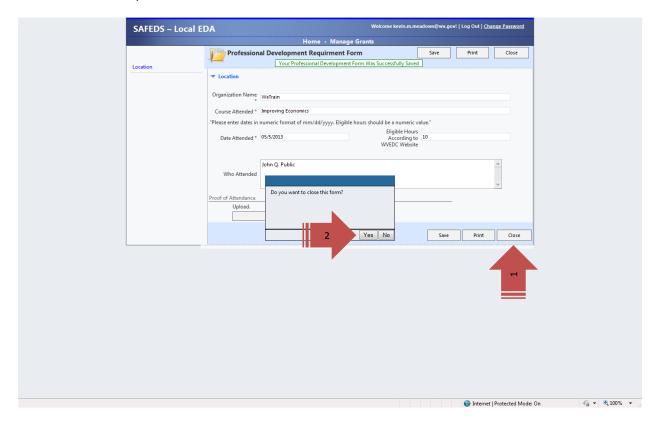
- 1. After all information has been entered and uploaded, click the **Save** button.
- 2. Confirm the save by clicking **Yes** when prompted.

#### Professional Development Form – Confirm Save



1. Confirm the document saved by looking for the message in green at the top of the page.

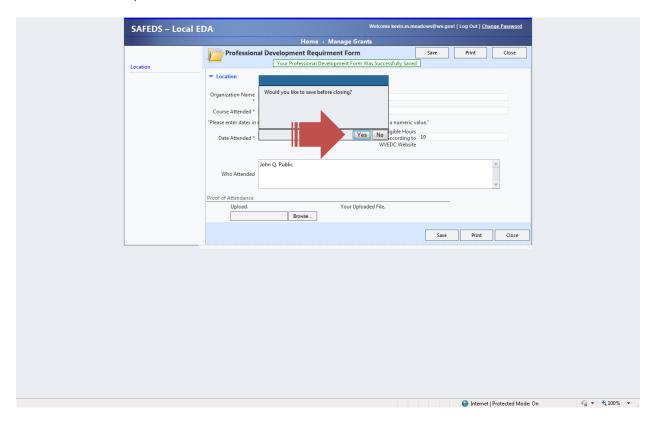
#### Professional Development Form – Close document



- 1. To return to the Create Grant Application Page, click the **Close** button.
- 2. When prompted to confirm the close, click Yes.

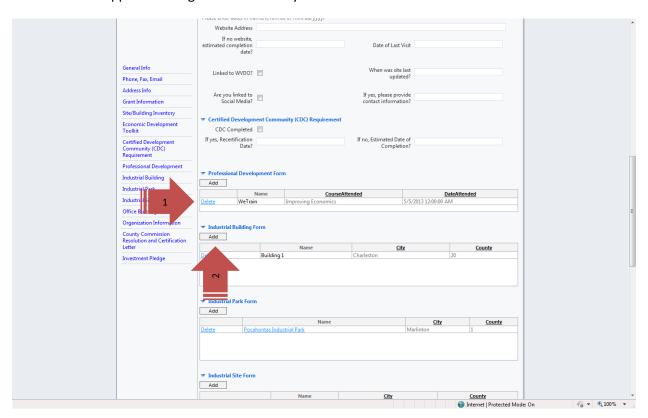
_		

#### Professional Development Form – Confirm Save



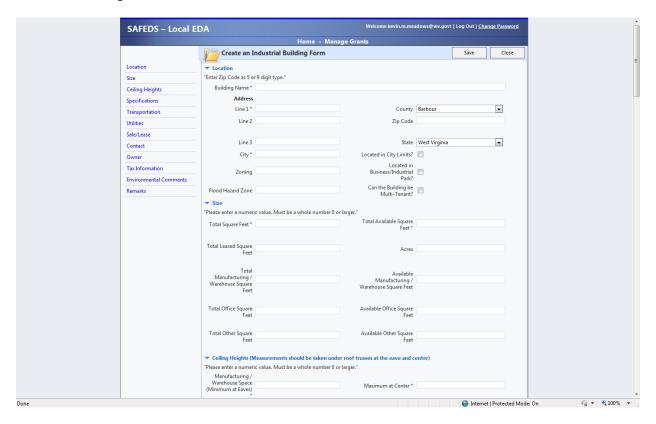
- 1. After confirming the close of the page, you will be prompted to save before closing.
- 2. Click Yes to ensure the document has been saved.
- 3. You will be returned to the Create a Grant Application Page.

#### Create a Grant Application Page - Confirm Entry



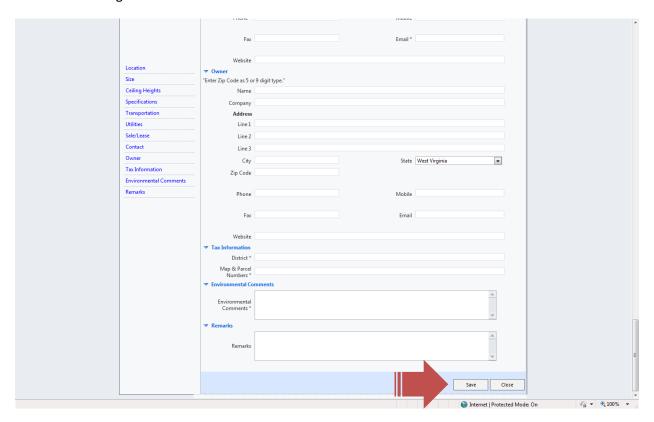
- 1. After returning to the Update Grant Application page, scroll to the Professional Development Form and confirm the document is listed in the box.
- 2. You are ready to move on to the Industrial Building Form. Click Add.

#### **Industrial Building Form**



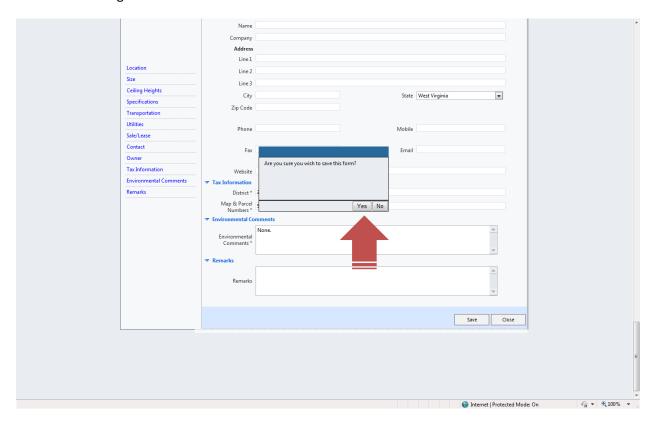
- 1. Enter as much information as possible to create a complete application
- 2. All required information regarding your organization is noted by an asterisk \*.

## Industrial Building Form – Save



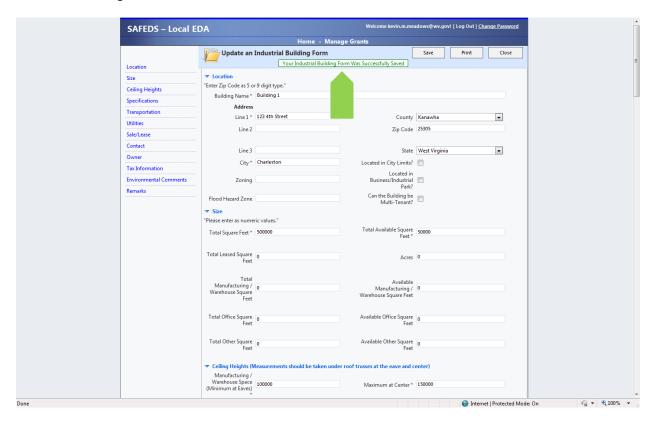
1. After all information has been entered, click the **Save** button.

## Industrial Building Form – Save



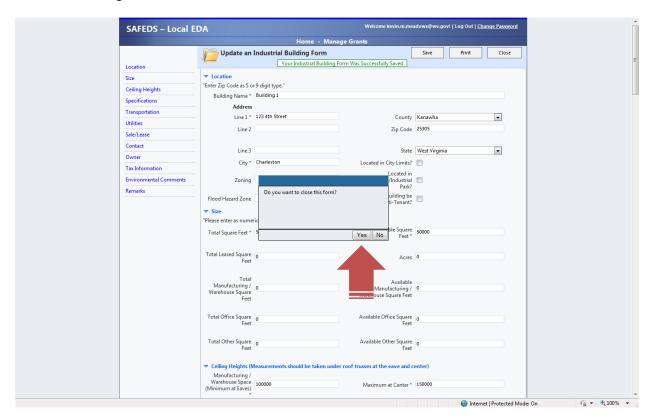
1. Confirm the save by clicking **Yes** when prompted.

#### Industrial Building Form - Confirm Save

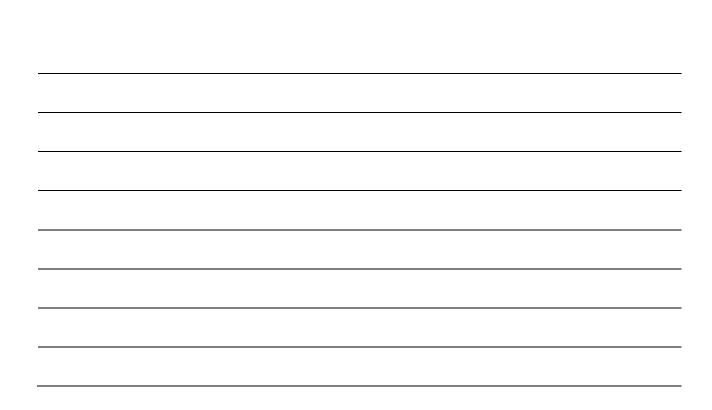


1. Confirm the document saved by looking for the message in green at the top of the page.

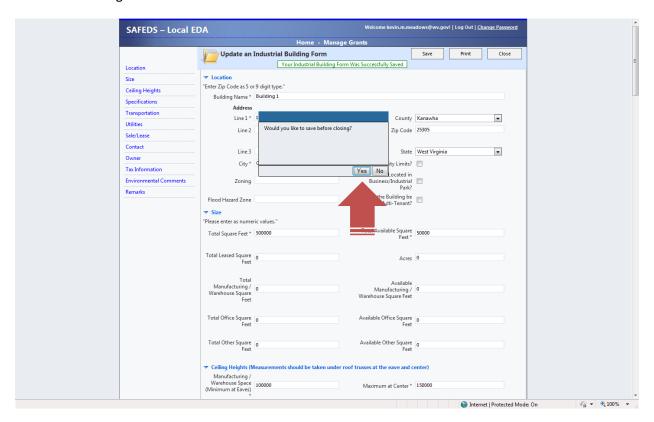
#### Industrial Building Form – Close



- 1. To return to the Create Update Grant Application Page, click the **Close** button.
- 2. When prompted to confirm the close, click Yes.

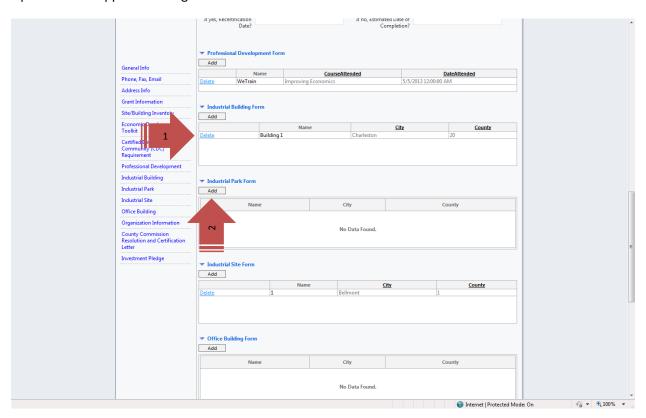


#### Industrial Building Form - Save



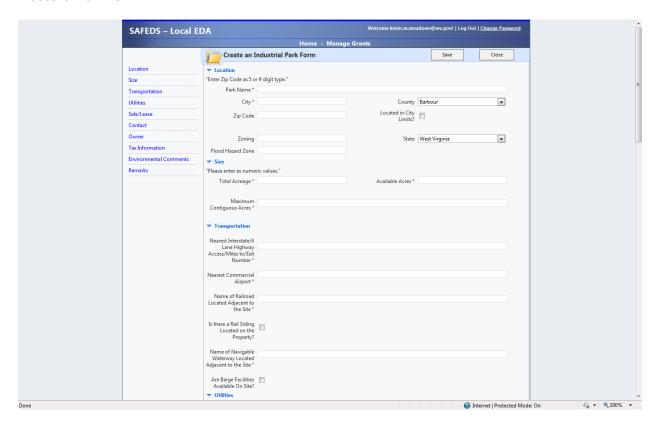
- 1. After confirming the close of the page, you will be prompted to save before closing.
- 2. Click **Yes** to ensure the document has been saved.
- 3. You will be returned to the Update Grant Application Page.

#### **Update Grant Application Page - Confirm**



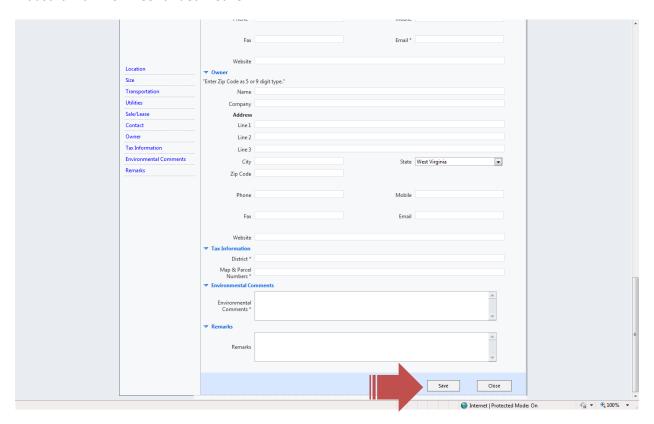
- 1. After returning to the Update Grant Application page, scroll to the Industrial Building Form box and confirm the document is listed.
- 2. You are ready to move on to the Industrial Park Form. Click Add.

#### **Industrial Park Form**



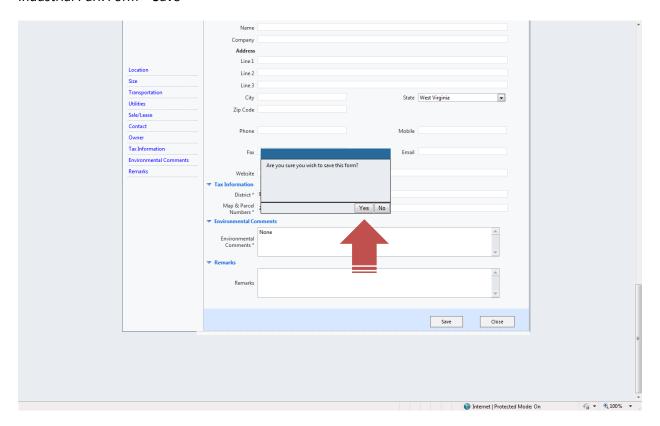
- 1. Enter as much information as possible to create a complete application
- 2. All required information regarding your organization is noted by an asterisk \*.

#### Industrial Park Form Continued – Save



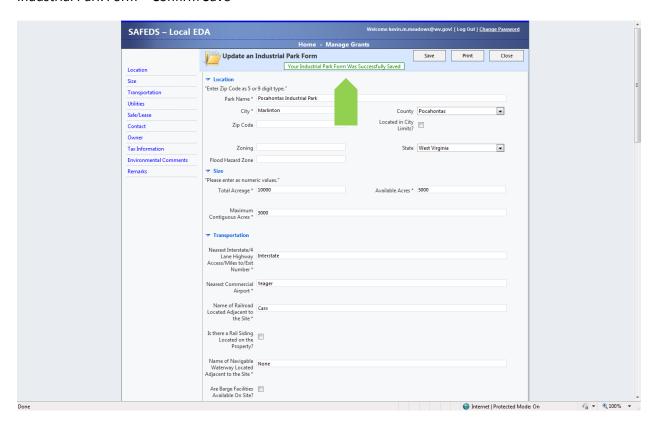
1. After all information has been entered, click the **Save** button.

#### Industrial Park Form – Save



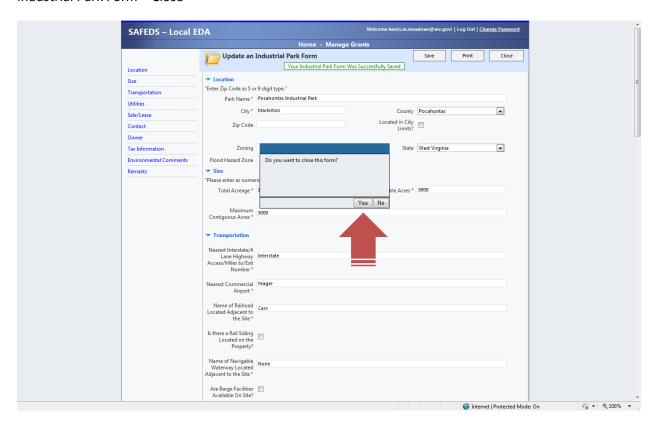
1. Confirm the save by clicking **Yes** when prompted.

#### Industrial Park Form - Confirm Save

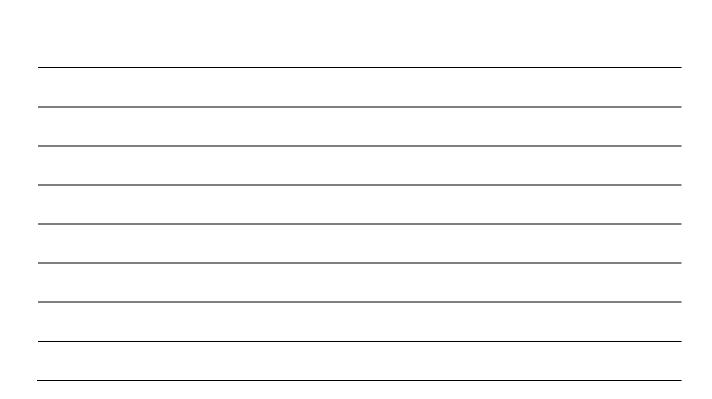


1. Confirm the document saved by looking for the message in green at the top of the page.

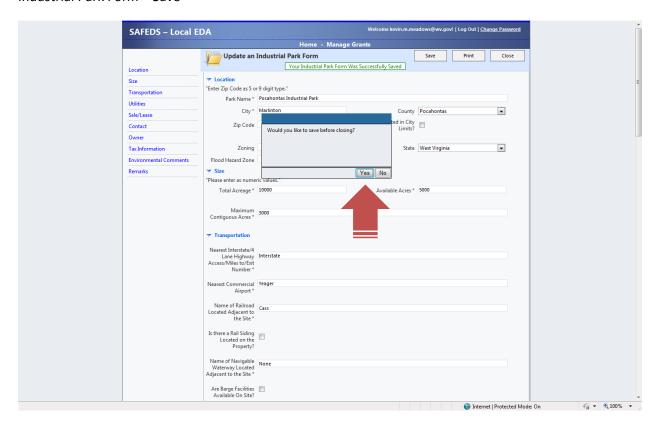
#### Industrial Park Form – Close



- 1. To return to the Create Update Grant Application Page, click the **Close** button.
- 2. When prompted to confirm the close, click Yes.

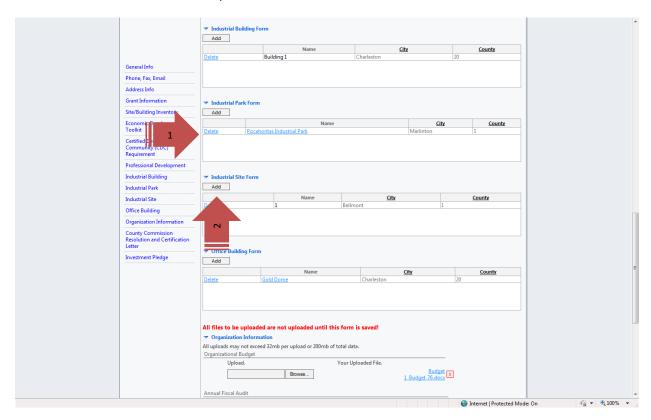


#### Industrial Park Form - Save



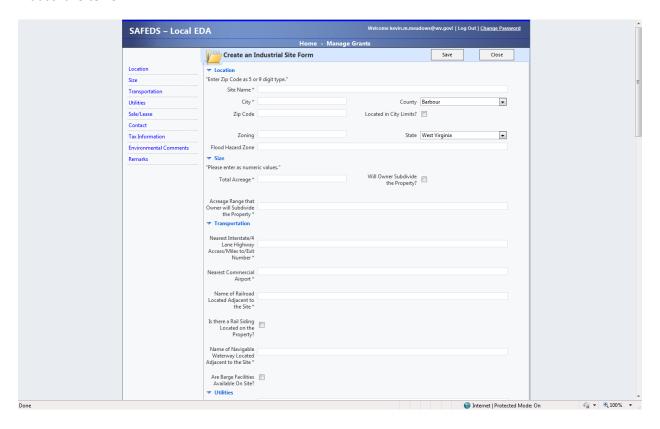
- 1. After confirming the close of the page, you will be prompted to save before closing.
- 2. Click **Yes** to ensure the document has been saved.
- 3. You will be returned to the Update Grant Application Page.

#### Industrial Park Form – Return to Update Grant Form



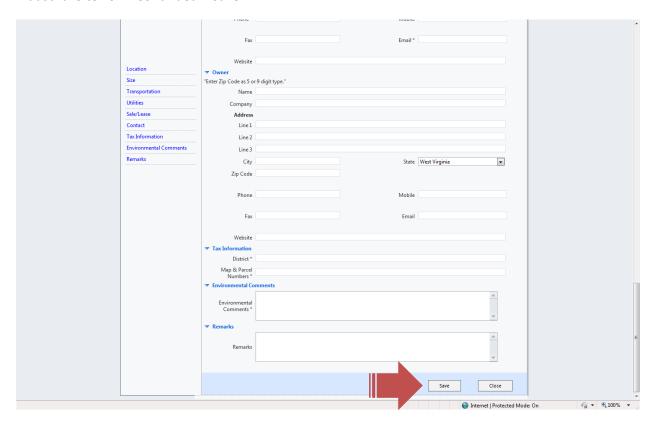
- 1. After returning to the Update Grant Application page, scroll to the Industrial Park Form box and confirm the document is listed.
- 2. You are ready to move on to the Industrial Site Form. Click Add.

#### **Industrial Site Form**



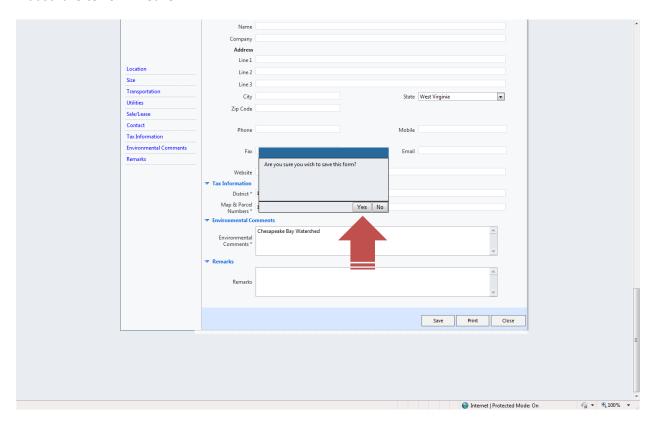
- 1. Enter as much information as possible to create a complete application
- 2. All required information regarding your organization is noted by an asterisk \*.

#### Industrial Site Form Continued – Save



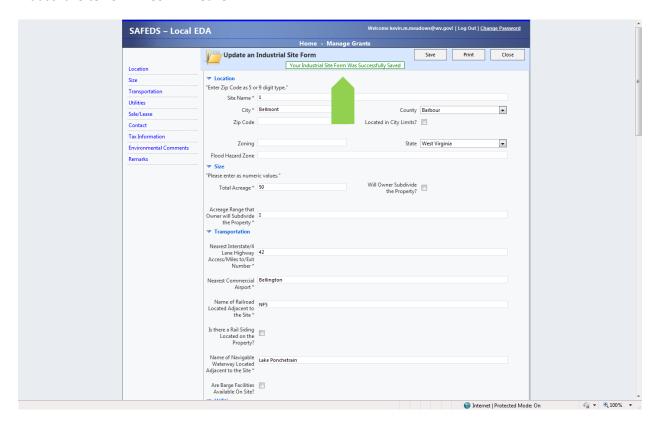
1. After all information has been entered, click the **Save** button.

## Industrial Site Form – Save

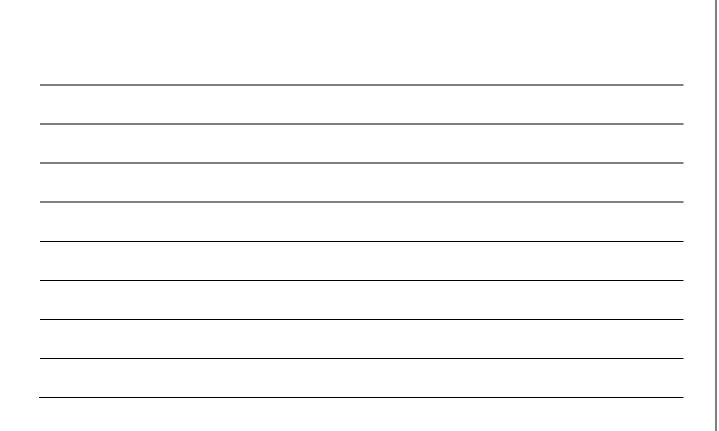


1. Confirm the save by clicking **Yes** when prompted.

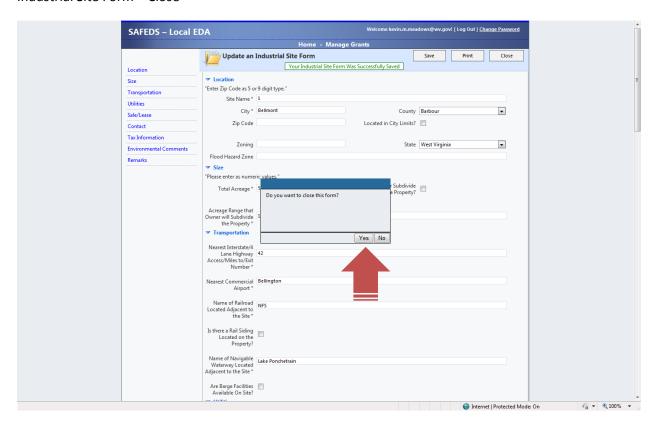
#### Industrial Site Form – Confirm Save



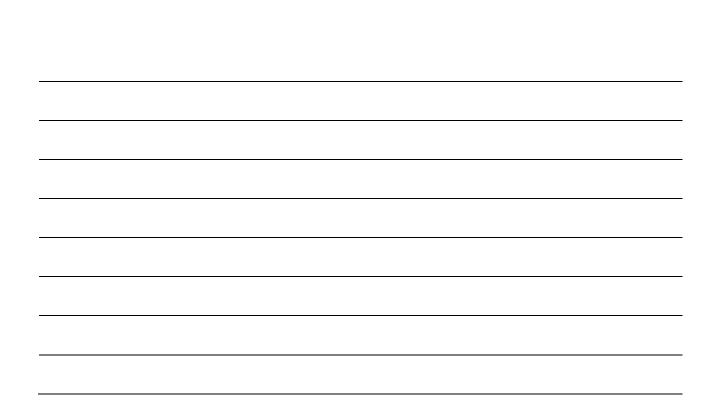
1. Confirm the document saved by looking for the message in green at the top of the page.



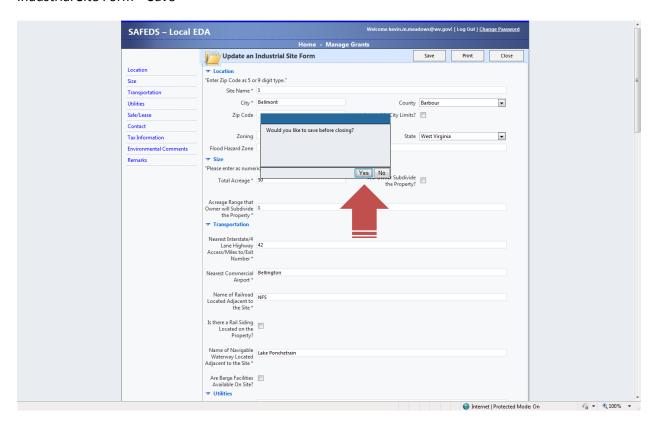
#### Industrial Site Form – Close



- 1. To return to the Create Update Grant Application Page, click the **Close** button.
- 2. When prompted to confirm the close, click Yes.

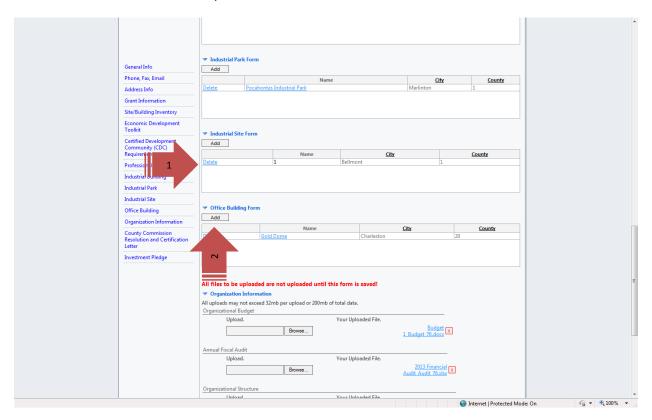


#### Industrial Site Form – Save



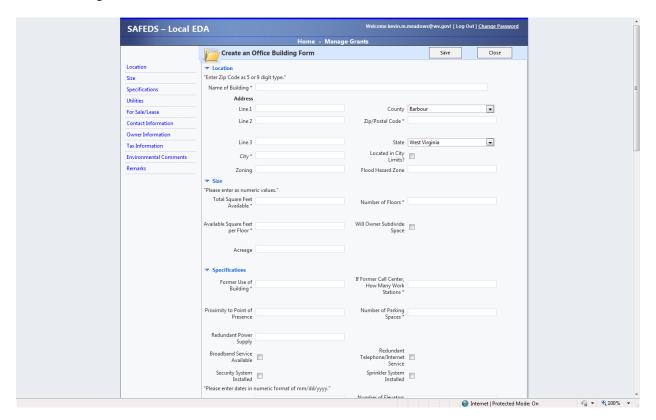
- 1. After confirming the close of the page, you will be prompted to save before closing.
- 2. Click **Yes** to ensure the document has been saved.
- 3. You will be returned to the Update Grant Application Page.

### Industrial Site Form – Return to Update Grant Form



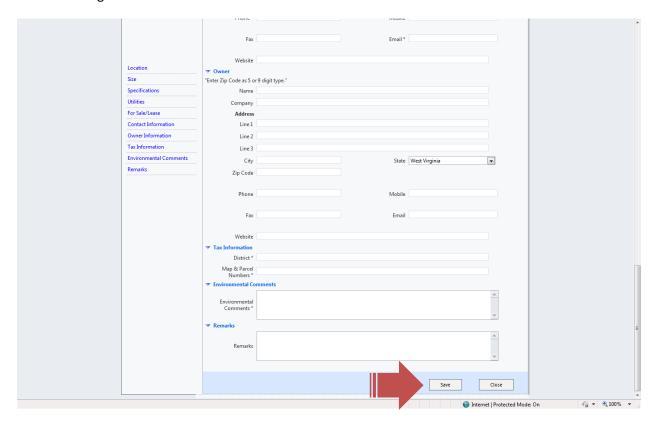
- 1. After returning to the Update Grant Application page, scroll to the Industrial Site Form box and confirm the document is listed.
- 2. You are ready to move on to the Office Building Form. Click Add.

### Office Building Form



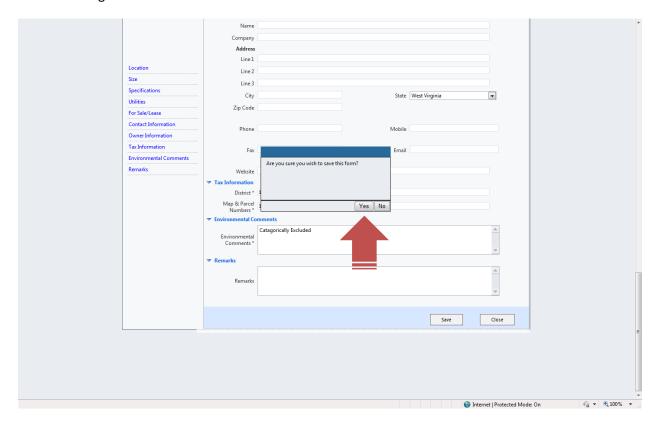
- 1. Enter as much information as possible to create a complete application
- 2. All required information regarding your organization is noted by an asterisk \*.

# Office Building Form Continued – Save



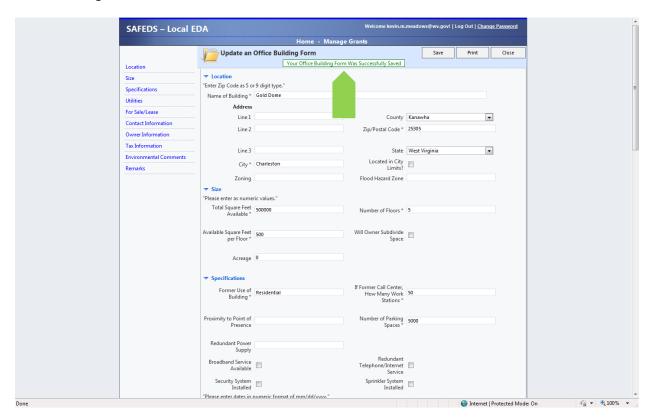
1. After all information has been entered, click the **Save** button.

# Office Building Form – Save



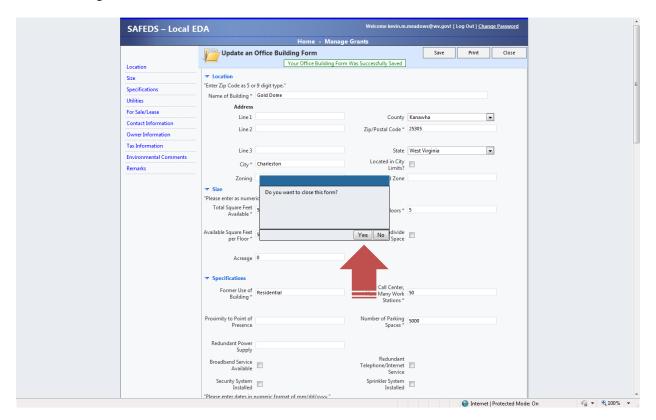
1. Confirm the save by clicking **Yes** when prompted.

### Office Building Form – Confirm Save

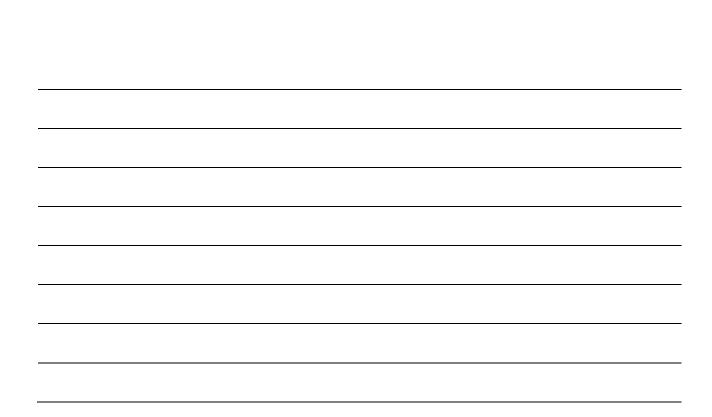


1. Confirm the document saved by looking for the message in green at the top of the page.

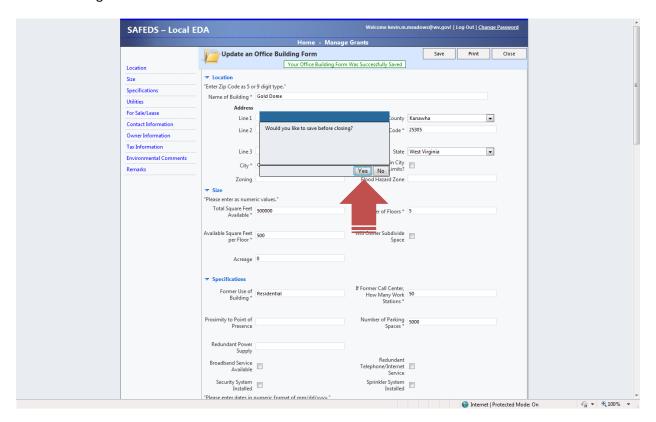
### Office Building Form – Close



- 1. To return to the Create Update Grant Application Page, click the **Close** button.
- 2. When prompted to confirm the close, click Yes.

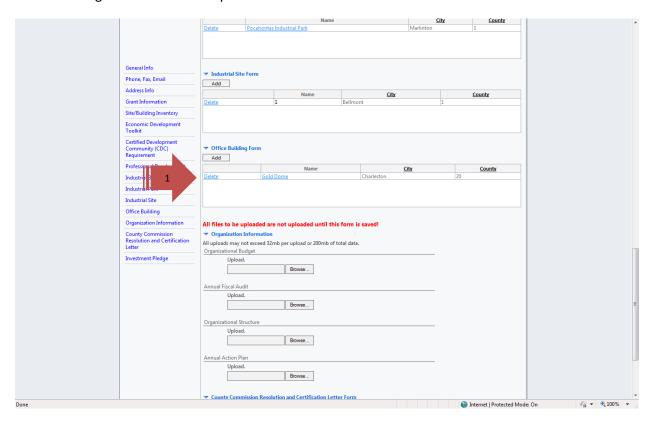


### Office Building Form – Save



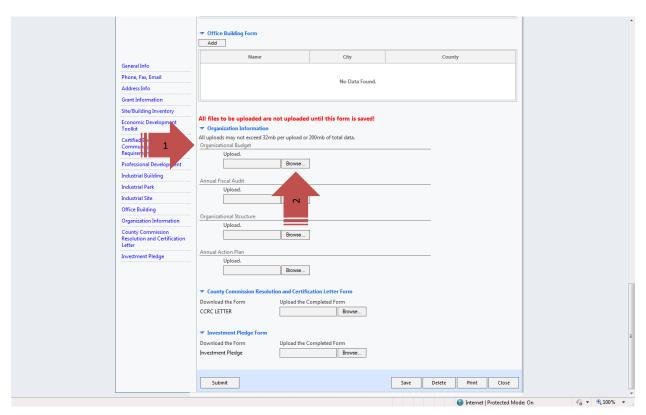
- 1. After confirming the close of the page, you will be prompted to save before closing.
- 2. Click **Yes** to ensure the document has been saved.
- 3. You will be returned to the Update Grant Application Page.

### Office Building Form – Return to Update Grant Form



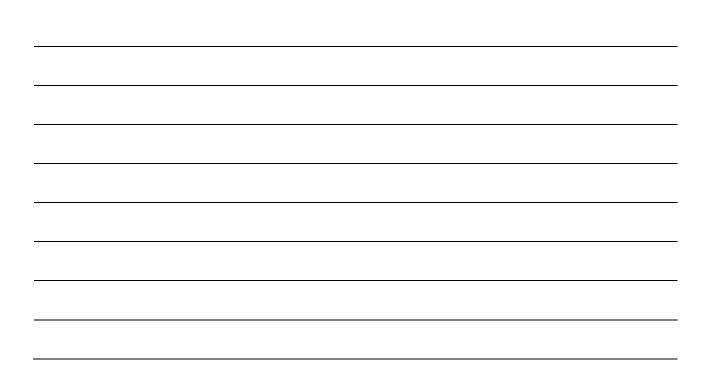
1.	After returning to the Update Grant Application page, scroll to the Industrial Site Form box and confirm
	the document is listed.

### **Uploading Documents**

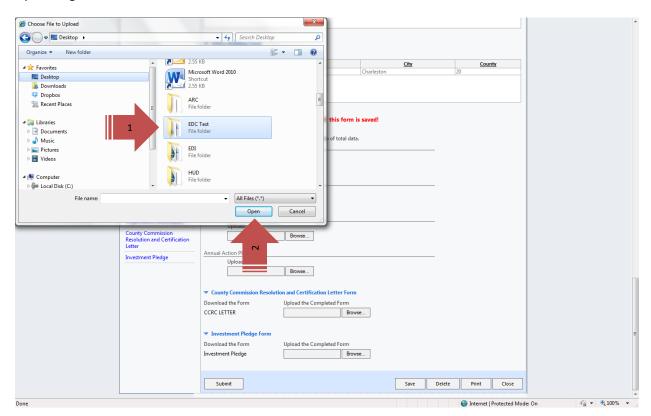


Applicants may now upload documents as part of their application. We will use Organizational Budget as an example in this manual.

- 1. Find the Organizational Budget item near the bottom of the Update Grant Application page.
- 2. Click Browse.

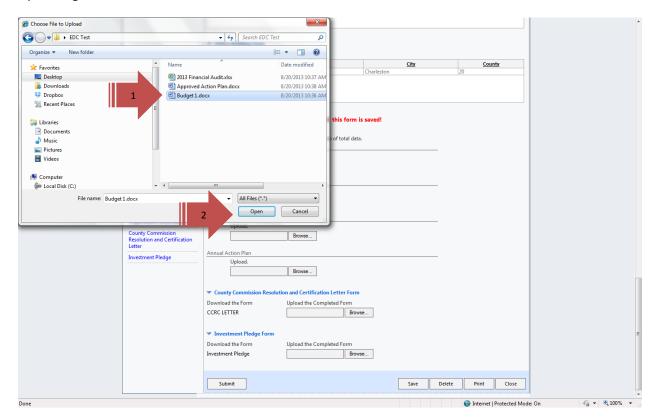


### Uploading Documents – Browse



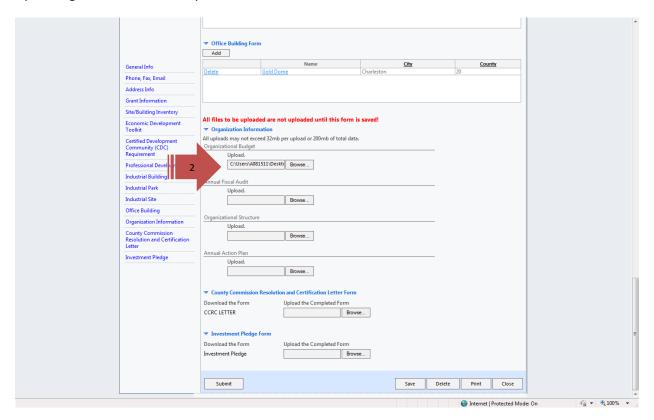
- 1. After clicking **Browse**, a Choose File to Upload window will appear.
- 2. Select the folder containing your file and click **Open.**

### Uploading Documents – Select



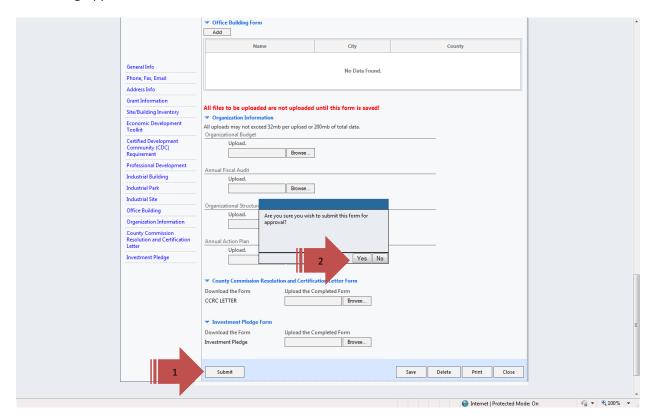
- 1. Find and select the file in the list of documents within the folder.
- 2. Click Open.
- 3. Only Microsoft Word, Excel, PowerPoint and Adobe PDF files will be accepted.

### Uploading Documents – File Uploaded



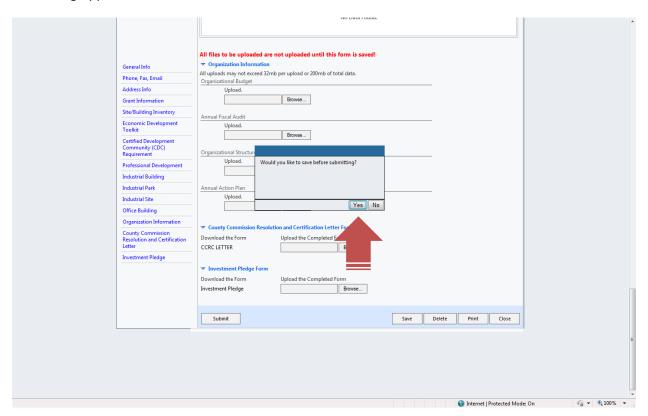
- 1. After clicking **Open** the second time, you will return to the Update Grant Application Page.
- 2. If uploaded correctly, you will see a file path in the Upload box. This is your document.
- 3. The same process is used for the remaining documents that must be uploaded to complete the application.

### **Submitting Application**



- 1. To submit the application, click **Submit**.
- 2. When prompted to confirm the submission, click Yes.

### Submitting Application – Save



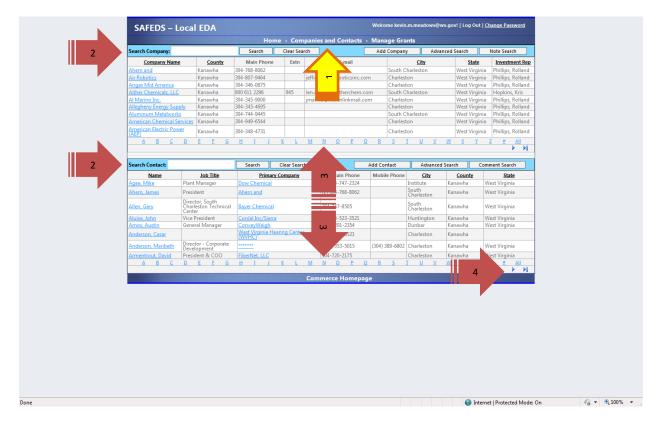
1. When asked to save the application before submitting, click Yes.

## Return to Manage Grants Screen



- 1. An e-mail will be sent to your organization and Tom Saunders after submitting the application.
- 2. Click on the **Home** link at the top of the screen to return to the Home Page.
- 3. Applications may be reviewed or edited by clicking on the Manage Grants link on this screen.

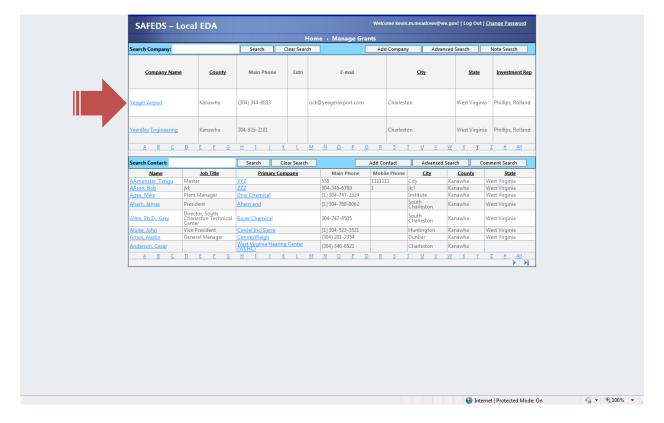
## Return to Companies and Contacts Page – Update



- 1. To update Retention and Expansion Notes, click on the Companies and Contacts link at the top of any screen.
- 2. To search, enter the Company or Contact name in the box provided and click the **Search** button.
- 3. The Company or Contact may also be found alphabetically by clicking one of the corresponding letters.
- 4. To scroll through the results, click the right arrow button.

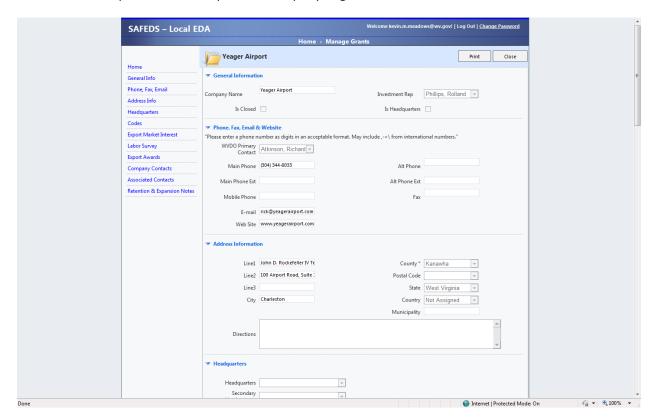
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### Retention and Expansion Notes Update – Select Company



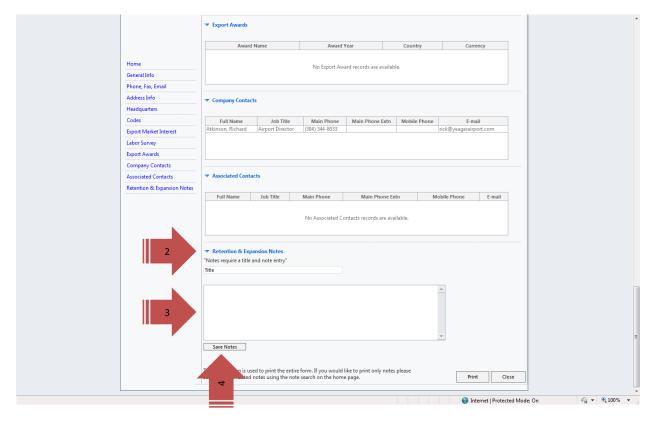
1. Select your company by clicking on the **Name** of the company.

### Retention and Expansion Notes Update – Company Page



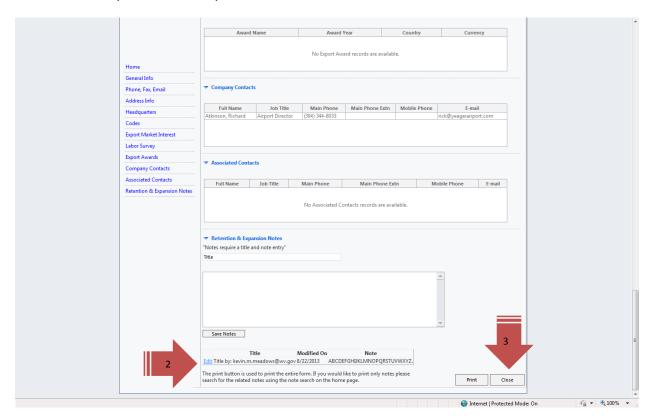
1. The selected Company's individual page will appear.

### Retention and Expansion Notes Update – Company Page

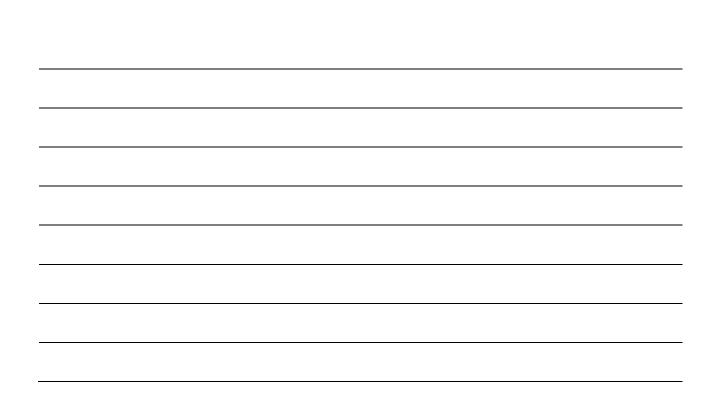


- 1. Scroll to the very bottom of the page.
- 2. You will see the Retention and Expansion Notes Section.
- 3. Enter the notes you feel are necessary in the box provided.
- 4. Click Save Notes.

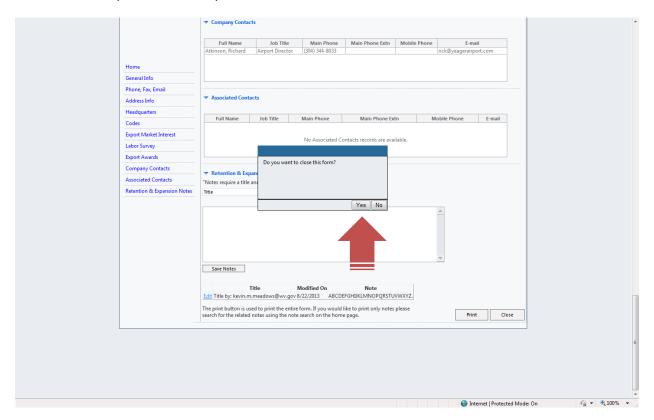
### Retention and Expansion Notes Update – Confirm Save



- 1. After saving the note, you will return to the top of the Company's Page.
- 2. Scroll back down to the bottom of the page and confirm the note was saved. All notes will be stamped with the individual's username and date the note was created.
- 3. Click Close.

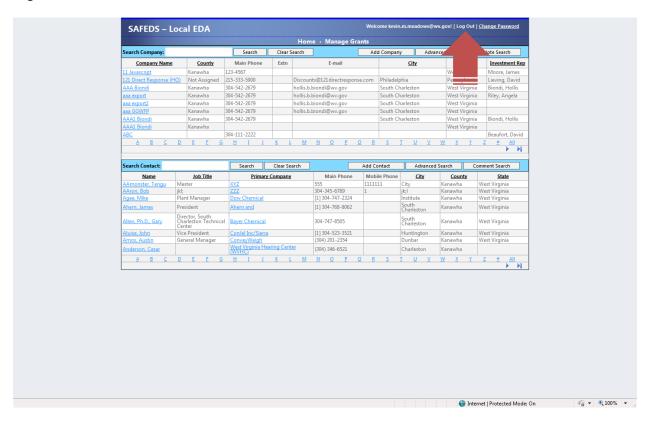


### Retention and Expansion Notes Update – Close



1. Confirm close by clicking Yes.

### Logout



- 1. After confirming close, the search page will appear.
- 2. Click Log Out.